Action	Instruction
Mark review held	
Choose Employee	Click the "ND Annual Employee Review" next to the appropriate employee
Enter the document	Click the "Mark Review Held" link next to the appropriate employee.
Mark review held	Click "Review Held."
Confirm	Click "OK."

Step 6—Complete / Close the document

Action	Instruction
Log into PeopleSoft and click the Talent Management Tab	To access screen: Team Performance ➤ Team Performance Documents ➤ Current Performance Documents
Choose employee	Click "ND Annual Performance Review" Next to the appropriate employee.
Enter to document	Next to "Complete Manager's Evaluation" click "Complete."
Complete	Click the "Complete" button.
Confirm	Click "Complete."
Finish	Click "OK."

PROCESS FOR EMPLOYEES WITHOUT COMPUTER ACCESS

If your employee does not have access to a computer he/she can still be actively involved in managing his/her own performance. You can sit with the employee at your computer and make changes together or you can enter the employee's changes in the computer yourself. Another option is to have the employee work from a printed/hard copy of the document. (Step 4 in the above selection outlines instructions for printing the Document.)

The following are some of the changes you can make.

Step 1—Establish Criteria
During the planning stage, provide the employee a copy of his/her performance plan and allow him/her to write his/her comments and ideas on the hard copy. Then, together you will decide what the final plan will look like. After that you can make the final changes to the plan.

Step 2—Performance Notes
Employee should track their own performance notes in a separate paper file.

Step 3—Performance Evaluation
In order for the employee to complete his/her self-evaluation, you will need to give him/her access to your computer or have him/her complete the evaluation on a printed/hard copy of the plan.

Step 4—Finalize Performance Document
After meeting with your employee to discuss his/her performance evaluation, the employee will need to sign a hard copy of the evaluation or use your computer to acknowledge that his/her performance review was held.

Rating Scale

Exceptional
Employee exceeded all performance expectations. Employee was an exceptional contributor to the success of his/her department and the State of North Dakota. He/she demonstrated role model behaviors.

Exceeds Expectations
Employee met all and exceeded most of the established performance expectations.

Meets Expectations
Employee met all performance expectations and may have exceeded some. Employee was a solid contributor to the success of his/her department and the State of North Dakota.

Needs Improvement
Employee met most, but failed to meet some performance expectations. Employee needs to further improve in one or more areas of expected job results or behavioral competencies.

Fails to Meet Expectations
Employee did not meet all or most of the established performance expectations. Employee needs significant improvement in critical areas of expected job results or behavioral competencies.

Not Rated
At the agency's discretion, a probationary employee may or may not receive a performance rating.

Rounding Rules

4.5—5.00 = Exceptional
3.5—4.49 = Exceeds Expectations
2.5—3.49 = Meets Expectations
1.5—2.49 = Needs Improvement
0.0—1.49 = Fails to Meet Expectations

Assistance

Please contact your assigned HR Officer for assistance.

North Dakota Performance Management Process

Manager System Job Aid

This information outlines the general steps a manager needs to take in PeopleSoft ePerformance to complete the different phases of the North Dakota Performance Management Process. (Your agency may have slightly different steps.)

Manager's Role

You will get an email indicating Performance Documents have been created. You can click the link in any PeopleSoft email,, log in and go to the specific task.

Step 1: Establish Criteria
1. Collaborate with employee to determine the performance expectations (competencies, goals, and responsibilities) for the upcoming plan year.
2. Enter the plan into the ePerformance system and submit for approval (if required).

Step 2: Performance Notes
1. Throughout the plan year, enter performance notes (if desired) for your employees. Remember to discuss these notes with the employee at the time of occurrence. This helps keep track of accomplishments and issues throughout the performance timeframe.

Step 3: Performance Evaluation
1. Review the employee's self-evaluation (if available).
2. Complete your evaluation for the employee in the system.
3. Submit evaluation for approval.
4. Discuss and finalize the performance document with the employee.
   Note: The Mid Year (December - January) and Annual (July) evaluation steps will be the same.

Note: ePerformance is accessed through PeopleSoft Manager Self Service (MSS) Talent Management Tab / Employee Self Service (ESS) My Page.

https://www.cnd.nd.gov/psp/strp/?cmd=login&errorPg=ckreq&languageCd=ENG

http://www.nd.gov/hrms/managers/talentmanagement.html

Step 1—Establish Criteria

Action	Instruction
Log into PeopleSoft and click the Talent Management Tab	To access screen: Team Performance ➤ Team Performance Documents ➤ Current Performance Documents
Choose Employee	Click "ND Annual Performance Review" on the same line as the desired employee.
Start Evaluation	Click "Start" on the same line as "Establish Evaluation Criteria."
Section 1: Employee Goals	These are agency specific or you may create your own.
Add	Click "Add Goal." (Add your own goal)
Enter Information	Enter a "Title," "Description," and any additional information.
	Click "Update."
Delete	Click the Trash Can Icon under individual goal to delete them.
	Click "Yes-Delete" to confirm delete.
Section 2: Competencies	Review statewide core competencies. These are pre-populated. There are 5 core competencies, 2 leadership competencies, and 15 behavioral competencies. If the leadership competencies do not pre-load you need to add them into this section.
Add Competencies	Click on "Add Competency"
Enter Information	Click "Search" without inserting any information.
Choose competencies	Click the desired boxes to add competencies.
Complete choice	Click "Save Selected Competency."
Delete	Click the Trash Can Icon under an individual competency to delete it.
	Click "Yes-Delete" to confirm delete.
Section 3: Job Responsibilities	Section is pre-populated for agencies on the statewide salary plan.
	You can add and delete responsibilities in this section.
Add	Click "Add a Job Responsibility."
Enter Information	Enter a "Title" and a "Description." (Paste job duties from JDQ.)
	Click "Update."
Delete	Click the Trash Can Icon under an individual responsibility to delete it.
	Click "Yes-Delete" to confirm delete.

Action	Instruction
Individual Learning	Click "Refresh Button."
	This will pull learning from ELM which occurred during the performance timeframe
Complete Performance Plan	You may click "Save" if you wish to exit this phase to return later.
	OR
	You may click "Complete" to finish this step.

Step 2—Performance Notes

Action	Instruction
Log into PeopleSoft and click the Talent Management Tab	To access screen: Team Performance ➤ Maintain Team Perf. Notes
Choose an employee	Select an Employee ID.
Add a new note	Enter From/Through. Click "Add a new note."
Enter note	Enter a subject and note text.
Complete the note	Click "Save" to exit the note. ("Saved" will appear in the top right corner of screen.)

Step 3—Performance Evaluation

Action	Instruction
Log into PeopleSoft and click the Talent Management Tab	To access screen: Team Performance ➤ Team Performance Documents ➤ Current Performance Documents
Review employee self-evaluation	(if available)
Review the document	Click the "ND Annual Performance Review" link next to appropriate employee.
View	Click "View" on the same line as "Review Self-Evaluation."
	Click the "Return to Menu" link.
Complete Manager Evaluation	To access screen (if necessary): Team Performance ➤ Team Performance Documents ➤ Current Performance Documents
	Click the "Annual Performance Review" link next to appropriate employee.
	Click "Start" on the same line as "Complete Manager Evaluation."
Enter Comments and Ratings	Enter comments in each comment box to justify ratings from the drop down lists for each competency, goal, and/or job responsibility.
(If peer or self evaluations have been conducted)	Click "View Other Authors" to pull comments from other raters.

Action	Instruction
Section rating	Click the Calculator Icon to calculate the average rating for each section (no weighting applied). Be aware that the employee's average rating will also appear.
Calculate Overall Performance Rating	Click the "Calculate all Ratings" button to calculate the overall rating for the entire evaluation (based upon section ratings and weights). Rounding rules apply.
Check Language	Click the "Check Language" button.
Save & Submit	Click "Submit for Approval" to complete the evaluation.
Confirm	Click "Submit" to confirm your submission.

Step 4—Printing the Evaluation (if needed)

Action	Instruction
Log into PeopleSoft and click the Talent Management Tab	To access screen: Team Performance ➤ Team Performance Documents ➤ Current Performance Document
Access the document	Click "ND Annual Performance Document."
Select the document you want to print	Click "Edit" or "View" on the document you want to print: "Establish Evaluation Criteria," "Review Self Evaluation," or "Complete Manager Evaluation" line.
Print	Click the Printer Icon.
Print Set Up	Click the following menu series: "File" ➤ "Page Setup" ➤ "Landscape" ➤ "OK."
Print the document	Click "File" ➤ "Print" from the menu.

Step 5—Finalize Performance Document (after HR Approval)

Action	Instruction
Log into PeopleSoft and click the Talent Management Tab (You will receive an email.)	To access screen: Team Performance ➤ Team Performance Documents ➤ Current Performance Document
Choose employee	Click the "ND Annual Employee Review" next to the appropriate employee.
Enter the review	Click "Edit" in the same line as "Complete Manager Evaluation."
Enter the document	Click "Available for Review."
Confirm	Click "OK."
Performance Evaluation Meeting	Hold face-to-face meeting with employee to discuss the performance evaluation and ratings.